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ABSTRACT

Preparing Educational and Training Consultants (PECT-II) is the second in a series of three cumulative and sequential instructional systems designed to help a cadre of educators acquire process training and consulting skills. The PETC-II graduate should be capable of forming a temporary relationship with a small group or major subsystem of an educational organization to help it make progress toward its goals. The consultant helps by diagnosing the client's problems and providing assistance that will temporarily add or strengthen such functions as managing, planning and validation which allow the group to more adequately accomplish its immediate goals. Currently the PETC-II consultant is expected to help the client become more effective in jointly selected group processes. This report is a summary of the Field Test and Outcome Milestone Report for Preparing Educational Training Consultants: Consulting (PETC-II), prepared by the Improving Teaching Competencies Program (ITCP) of the Northwest Regional Educational Laboratory (NWREL). It provides a summary of the results of five evaluation activities: (1) workshop evaluations, (2) consulting case studies, (3) internal summative reviews, (4) an alternative search, and (5) a survey of potential users. (Author/DEP)

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EVALUATION

IMPROVING TEACHING COMPETENCIES PROGRAM

SUMMARY OF FIELD TEST AND OUTCOME MILESTONE REPORT FOR PREPARING EDUCATIONAL TRAINING CONSULTANTS: CONSULTING (PETC-II)

Improving Teaching Competencies Program

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PREFACE

This publication is one of a series of summary evaluation reports issued by the Northwest Regional Educational Laboratory to document evaluation findings for selected products. The subject of this report is *Preparing Educational Training Consultants: Consulting (PETC-II)*, an instructional system developed in the Improving Teaching Competencies Program.

This summary report presents the methods and results of the field test and outcome milestone evaluations.

Lawrence D. Fish
Executive Director

INTRODUCTION

The following is a summary of the *Field Test and Outcome Milestone Report for Preparing Educational Training Consultants: Consulting (PETC-II)*,[1] prepared by the Improving Teaching Competencies Program (ITCP) of the Northwest Regional Educational Laboratory (NWREL). This report provides a summary of the results of five evaluation activities: (a) workshop evaluations, (b) consulting case studies, (c) internal summative reviews, (d) an alternatives search and (e) a survey of potential users. The reader is referred to the full technical report for a detailed description of the methodology and results of each of the evaluation activities.

PETC-II is the second in a series of three cumulative and sequential instructional systems designed to help a cadre of educators acquire process training and consulting skills. The *PETC-II* graduate should be capable of forming a temporary relationship with a small group or major subsystem of an educational organization to help it make progress toward its goals. The consultant helps by diagnosing the client's problems and providing assistance that will temporarily add or strengthen such functions as managing, planning and validating which allow the group to more adequately accomplish its immediate goals. Currently the *PETC-II* consultant is expected to help the client become more effective in jointly selected group processes.

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[1] Milczarek, G., C. George and P. Schmuck. *Field Test and Outcome Milestone Report for Preparing Educational Training Consultants: Consulting (PETC-II)*. Portland, Oregon: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, 1976.

The *PETC-II* materials consist of a trainee manual, a trainer's manual and a set of orientation papers which introduce the system and outline procedures for the installation of a *PETC-II* workshop. The trainee manual includes theory papers, diagnostic instruments and instructions for the learning activities. The trainer's manual is a set of the trainee materials interspersed with detailed directions for conducting the eleven sessions of a *PETC-II* workshop.

A *PETC-II* workshop is divided into three parts, the first consisting of three consecutive 10-hour days of instruction in basic concepts of consulting. The second part is a 3-day practicum in which trainees engage in consulting projects with prearranged client systems. The training concludes with three days of debriefing, evaluation of the consulting practicum and integrating learnings of the workshop. A typical workshop consists of from 12 to 18 trainees and 2 trainers.

EVALUATION ACTIVITIES

Workshop Evaluations

Three field test workshops (two in Seattle, Washington, and one in Fairfax, Virginia) were conducted to obtain participant judgments of the efficacy of the instructional materials under field conditions.

The participants were recruited under the direction of the ITCP's Office of Field Relations and Dissemination. In Seattle fliers describing the overall training program were circulated through the district and quotas were set for various subsystems in the district. Approximately 110 applications were received. A committee was formed to determine selection criteria and to make the final selection of 70 participants to begin the program. Of these 70, 50 were expected to complete *PETC-I*, 25 were expected to complete *PETC-II* and 20 would complete *PETC-III*. Two

PETC-II workshops were conducted with nine participants in the first (Seattle A) and 10 participants in the second (Seattle B).

In fairfax the superintendents' staff members personally selected a given number of candidates from their staff to form a cadre of 24 participants who would complete the entire Providing Organizational Development Skills (PODS) program. (The PODS program includes *PETC-I, PETC-II, PETC-III* and their prerequisite systems.) The selection criteria called for staff members who: (a) already performed training and consulting tasks on their jobs, (b) could provide released time to be trained and to train others and (c) were the primary decision makers concerning staff development.

Biographical information collected from the participants indicated that the two Seattle workshops were composed primarily of counselors, social workers and psychologists. The Fairfax workshop consisted of six administrators and four counselor/psychologists. The educational background and age were similar for all three workshops. Participants from the Seattle A workshop reported less previous consulting experience than the Seattle B and Fairfax participants.

To recruit the practicum client groups in Seattle, the workshop installer mailed letters to 13 educator groups and 12 citizen groups who were working with the district on human service concerns. After the installer met with interested groups, three educator groups were selected as Seattle A's practicum clients and three citizen groups as Seattle B's practicum clients.

In Fairfax the installer contacted groups with which he was familiar as well as potential client groups suggested by others. Most of the groups indicated interest and five were selected.

Consultation Case Studies

Followup interviews of participants at the three field test sites and two of the interim sites (Portland and Eastern Washington) were conducted during June 1975. The elasped time since the *PETC-II* training varied from 7 months at Fairfax to 20 months at Portland. Information was collected regarding the amount and nature of consulting done since training, participant perceptions of the usefulness of the training, as well as participant judgments of the appropriateness of the workshop content and strategies. Additionally, information was collected to determine self-evaluation of participant consulting ability.

Summative Review

A summative review was conducted for four days at the Northwest Regional Educational Laboratory. The four reviewers selected were Gene Mulcahy, Trustee of the Knox Foundation and former Director of Shanti School, Hartford, Connecticut; Ann Barr, elementary school teacher and member of the Cadre of Organizational Communication Consultants, Eugene Public Schools, Eugene, Oregon; Bunyan Bryant, Assistant Professor, School of Natural Resources, University of Michigan and former member of the Educational Change Team, Ann Arbor, Michigan; and Bonard Wilson, consultant with the Leadership Institute of Spokane and former UNESCO Consultant to the Ministry of Education, Indonesia, Rhodesia, Panama and the Phillipines. The reviewers were asked to write a critique of the *PETC* instructional system that addressed the following items: rationale and goals, target populations, content, instructional procedures, trainer role and potential side effects.

Alternatives Search

A search was conducted to identify and describe alternatives to the *PETC* training in consulting and organizational development. Over 100 letters requesting information were mailed to people and institutions associated with process consulting and organizational development. This process identified 35 instructional systems, of which 12 were judged to be similar to *PETC*. These 12 systems were then compared with *PETC's* target population, training content, instructional procedures, expected outcomes, trainers and dissemination.

Survey of Potential Users

The survey of potential users asked members of the target population the extent to which they believe an educational need exists for *PETC* skills, as well as their personal interest in *PETC* training. The survey was mailed to a random sample of 264 educators with staff development positions in state departments of education or public school districts. Of this sample, 100 questionnaires were returned, a return rate of 38 percent.

RESULTS

The results of the five evaluation activities have been summarized and are organized into the major aspects of the instructional system that were evaluated: (a) need or justification, (b) rationale, goals and objectives, (c) training content, (d) instructional procedures, (e) training effectiveness and (f) participant satisfaction.

NEED OR JUSTIFICATION

Due to the 38 percent return rate for the survey of potential users, the results were not statistically generalizable to the total population. Respondents to the survey of potential users, however, indicated they considered staff development functions addressed by *PETC* to be important in meeting their personal and program goals. It should be noted that they considered the traditional staff development functions as important as those functions related to *PETC*. When provided with a description of *PETC*, at least 86 percent of the respondents indicated the *PETC* instructional system would "perhaps" or "definitely" be useful in reaching their personal or program goals for staff development. Of the respondents, 72 percent indicated they believed there was definitely a need in the educational community for educators with group process consulting abilities. The field test participants concurred with this judgment; 86 percent indicated a "definitely strong need" and 14 percent indicated "probably some need" for such training. The cost and time factors appear to pose potential problems for the installation of *PETC*. Of the respondents, 47 percent indicated their program might pay the cost in time and money of *PETC* training. Only 18 percent, however, believed their program would allow two weeks or more for *PETC* training. Some participants (43 percent)

indicated they, personally, would allow two weeks or more. A personal interest in attending a workshop such as *PETC* was indicated by 66 percent of the respondents.

The alternatives search identified 12 instructional systems that were judged to be serious alternatives to the *PETC* series (*PETC-I, PETC-II and PETC-III*). Of the 12 alternative programs, 3 are described as having a target population comparable to *PETC's*. The alternatives search indicated there are definitely training systems in use which are similar and/or complementary to the *PETCs* and their prerequisites in at least some of the content and strategies. While many appeared to contain some material not in the *PETCs*, none seem to contain most of what is in *PETC-I* or in a significant part of *PETC-III*. Much of the content of the identified alternatives appeared more descriptive of the prerequisite systems than the *PETC* series.

RATIONALE, GOALS AND OBJECTIVES

The workshop participants evaluated the goals and objectives highly as to their clarity and importance. Clarity was rated good or excellent by all but one participant, and the importance of the goals was rated good or excellent by all of the participants.

The four summative reviewers were also generally positive in their evaluation of the rationale, goals and objectives. The summative reviewers based their evaluation on an examination of the workshop materials and supporting documents. Three of the four reviewers felt the goals and objectives were clearly stated. All reviewers thought the claims and disclaimers in the system were clear and well stated. The broad goal of *PETC*, to improve the organizational effectiveness of educational systems by preparing educational training consultants, was considered socially

significant. However, the reviews raised four social justice concerns. The first concern related to the target population for *PETC*. Reviewers felt the exclusion of individuals not able to pay for the training either in dollars or time implicitly reinforced a process of race and sex differentiation. The second concern related to the neutral value stance of *PETC* in relation to social justice issues. A suggestion was made that an additional package, such as the ITCP's *Social Conflict and Negotiative Problem Solving*, be constructed to directly deal with problems of social justice. A third concern related to sexist and racist implications. The use of sexist language was pointed out by all the reviewers. The final concern was the potential "misuse" of *PETC* training. One reviewer stated that "although well intended, the *PETC* programs may set the conceptual or theoretical framework for skillfully supporting or maintaining deep-seated cultural patterns."

TRAINING CONTENT

The field test participants evaluated the training content on the final questionnaire. The workshop materials were rated positively on the criteria of clarity (54 percent of the participants gave a positive rating), interest (82 percent rated as positive), and of demanding original thinking (68 percent rated as positive). None of the participants rated the workshop content below satisfactory on the dimensions of: appropriateness, relevance, clarity, parsimony and practical significance. The major conceptual models employed in the system were rated positively as to their clarity and utility. Additionally, the preworkshop orientation materials were rated positively in terms of providing the information needed by participants as well as giving them clear and correct expectations.

On the training logs and in their conversations with the evaluators, none of the workshop trainers reported any major content problems.

Overall, the summative reviewers rated the training content positively. Each reviewer made some specific criticisms and recommendations, but no general agreement was reached on them.

INSTRUCTIONAL PROCEDURES

The field test participants positively evaluated the workshop procedures according to the following criteria. At least 93 percent of the participants thought the procedures were good or excellent in their appropriateness and usefulness for learning consulting skills. The procedures were rated good or excellent in the efficient use of time. The value of the practice exercises and the usefulness of the training structure were rated high by 86 percent of the participants, as was the amount of time provided for reflection and personal growth (also rated highly by 86 percent of the participants).

The workshop installers indicated in an interview they thought the workshop procedures were feasible for the recruiting of participants and practicum clients. They reported the recruitment information and installation guidelines were useful.

The trainers reported the directions for each session were adequate. No major problems or modifications of the workshop design were reported on the trainer logs. Some problems were reported concerning the workshop environment and interpersonal issues of participants.

The summative reviewers, from an examination of the trainer's manuals, rated the workshop procedures positively. Specific criticisms were made by each reviewer but there was no general agreement on them.

TRAINING EFFECTIVENESS

Three kinds of information pertaining to training effectiveness were collected: (a) participant and client perceptions of the value of the workshop practicum, (b) the amount and nature of the consulting done by *PETC-II* graduates and (c) self-ratings by *PETC* graduates of their consulting competence.

On the final questionnaire the participants thought the practicum was a valuable experience; 93 percent checked 5 or 6 on a 6-point anchored rating scale with 6 the high point. The most frequently listed factors contributing to their satisfaction were the experience provided by the practicum and the opportunity to practice consulting skills

All but one of the practicum clients indicated they were satisfied with the consulting provided by the *PETC* participants; 23 of the 42 were "very pleased" with the consulting experience. Of the practicum clients, 37 of 40 felt the consulting experience was helpful; 3 felt the experience was of little help to them. All but 2 of the practicum clients responding to the practicum client questionnaire were able to identify a specific change they intended to make as a result of the consulting experience.

Information was collected on the amount and kind of consulting done by *PETC-II* graduates. Of the 41 graduates interviewed, 25 had completed further consulting since the workshop. The amount of consulting ranged from one time to twenty-five to thirty times. Of those who had consulted, over half consulted less than five times. An analysis was done of the amount of consulting after training of those with no prior consulting experience. Of the nine respondents who indicated they had no prior consulting experience, five had consulted after training, four had not.

An analysis of the effect of one's professional role on the amount of consulting done indicated that for this sample, administrators were more likely to consult than nonadministrators. Information collected on a followup interview indicated the consulting graduates worked on a wide range of client problems and goals, as was expected. Of the 33 consultants reported, 13 involved the consultant's planning or conducting a workshop or training. The graduates perceived their consultations as helpful to the client groups in solving their problems. Of those that had not consulted, the most frequently listed reasons for not consulting were: insufficient time to consult, their professional role did not include the possibility of consulting and no one had requested consulting help. All but one of the respondents to a followup interview indicated that they had planned to do consulting in the future.

All but one of the respondents indicated they had used the training in less formal ways than actual consulting. These included: identifying areas of needed organizational change; helping a group develop a program or organization for meeting a goal; organizing and planning own efforts to help a group; helping own group through a change process; and helping someone understand a potentially destructive experience in a group or organization as part of a counseling process.

The consulting skills of the *PETC-II* participants were evaluated by themselves as well as by the practicum clients. On the practicum client questionnaire, all but one of the respondents rated the consultants as generally competent in areas where help was needed. Additionally, the self-ratings of *PETC-II* graduate ability were positive with mean responses of 1.46 to 2.58. (These were rated on a 5-point anchored rating scale with 1, excellent ability and 5, unsatisfactory ability. The respondents

rated themselves most capable of building a helping relationship, identifying alternative solution strategies, and understanding group processes and problems. Respondents rated themselves lowest on the abilities to help build motivation to change, help the group generalize and stabilize their change, and help the group evaluate the change and the change effort.

PARTICIPANT SATISFACTION

On the final questionnaire, 7 of the 9 participants at Seattle A and all of the participants at Seattle B and Fairfax rated the workshop as worthwhile. The positive perceptions were maintained over time with all but one of the respondents on the followup interview rating the workshop as worthwhile and half of the respondents judging it extremely worthwhile. Of the participants, 86 percent indicated that the workshop met their expectations. The participants rated the workshop positively compared to other professional education courses. On the final questionnaire, 24 of the respondents felt the costs in time and money were small for the outcomes, 2 respondents felt the costs were about right. On the followup interview, 17 respondents felt the costs were small for the outcomes; 5 felt the costs were about right for the outcomes.

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